

Contract Document Workflow

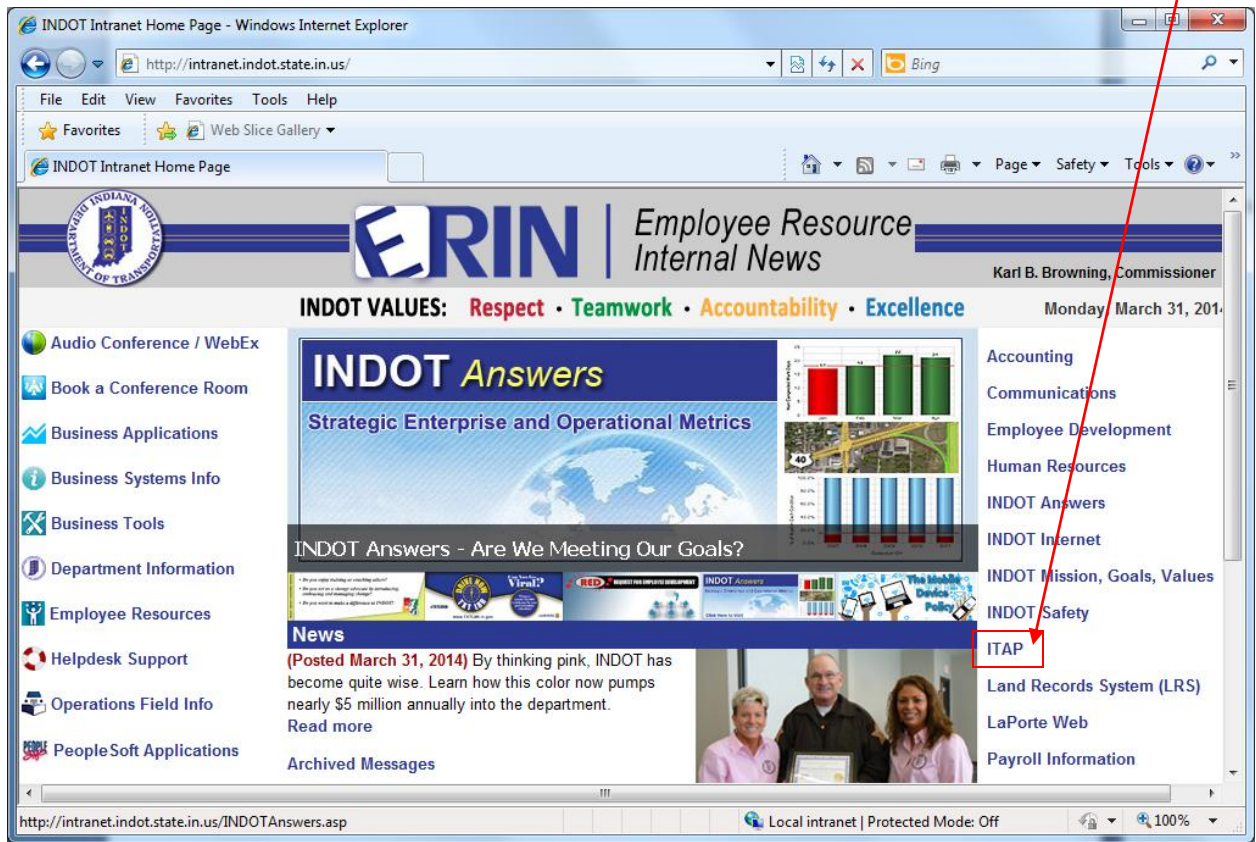
By John Dosch
Last Updated 04/22/2014

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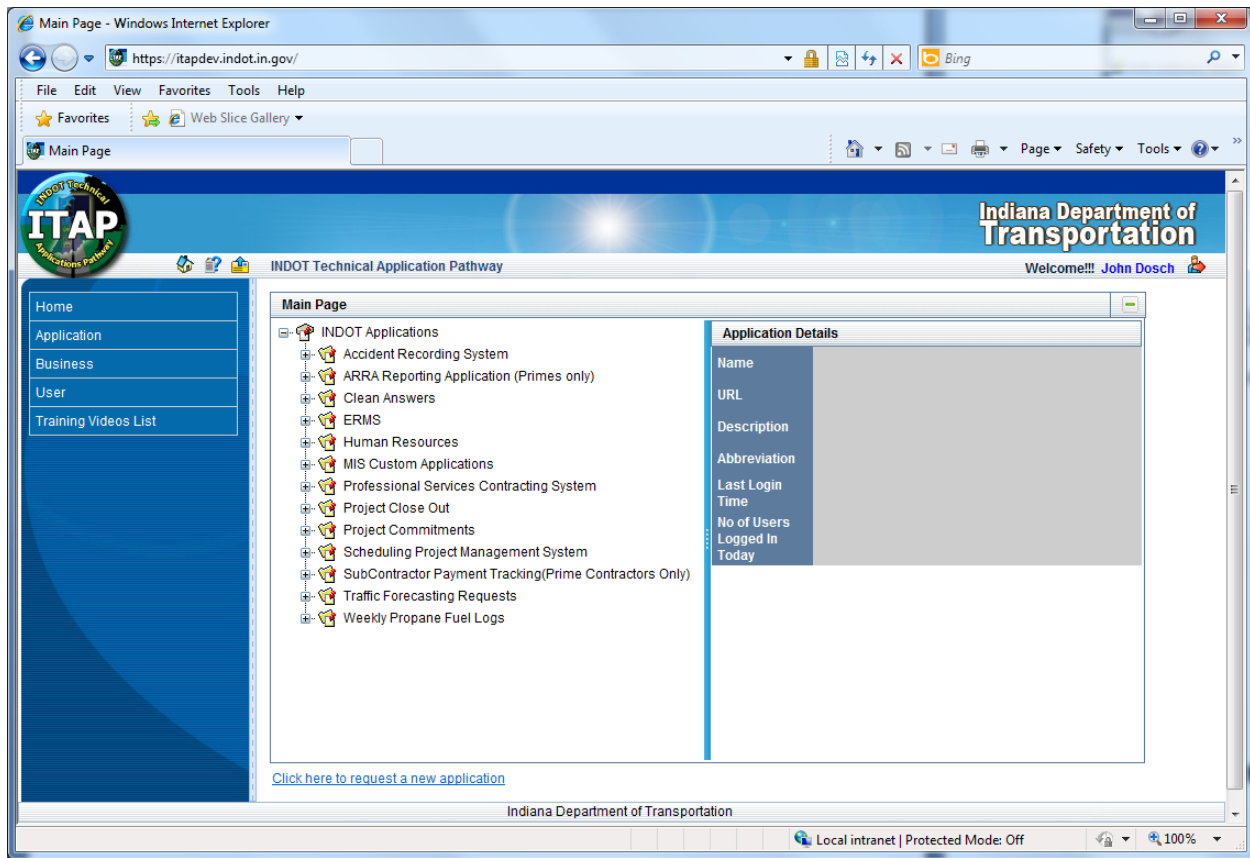
1.) Getting to the Contract Document Workflow Links

In order to get to the links for the Contract Document Workflow users will need to go through ITAP. Here are the steps to get to ITAP.

- 1.) Open Internet Explorer and wait for the ERIN (Employee Resource Internal News) website to open. Once it is open, click on the "ITAP" link.



This will take you to the ITAP page.



In order to get to the Contract Document Workflow links, the user must use the following chain of applications.

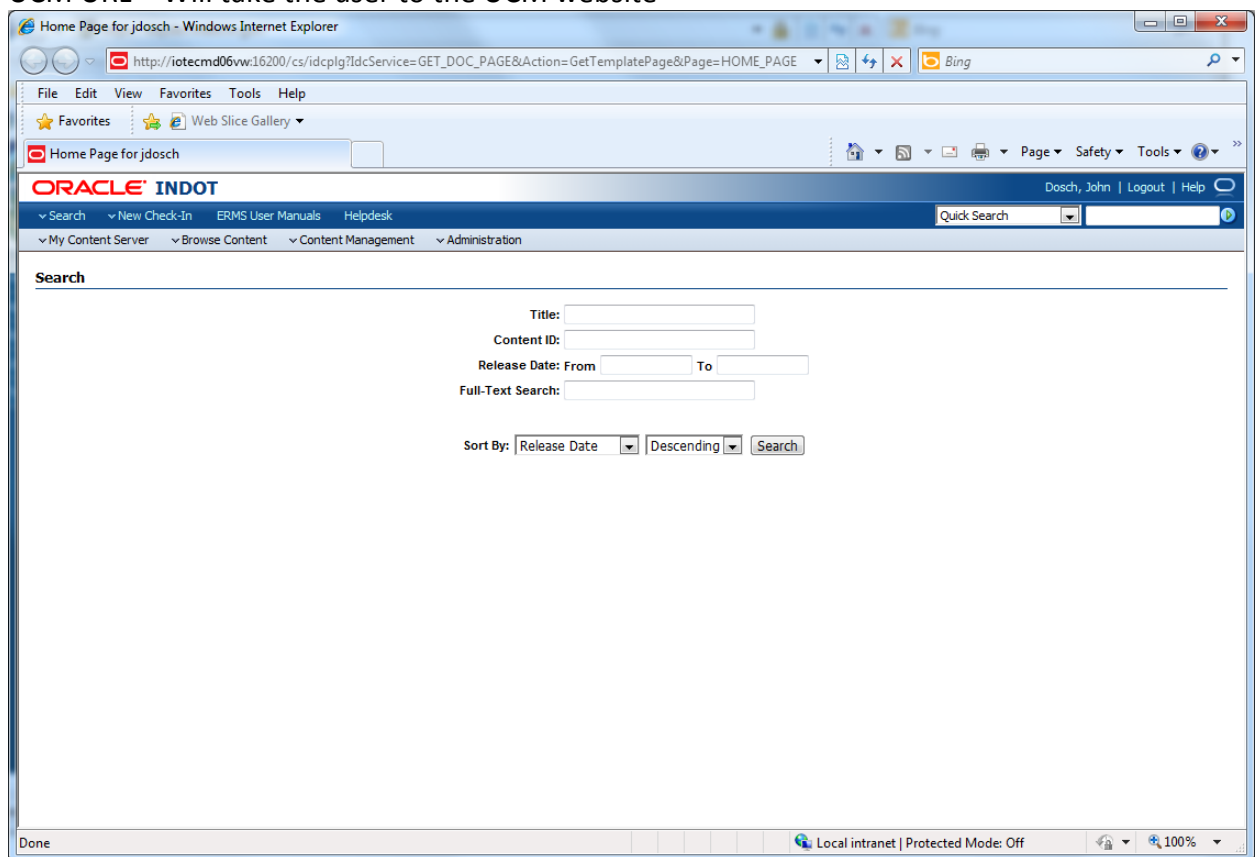
1. INDOT Applications
2. ERMS
3. Letting Documents
4. Contract Document Workflow

After going through this chain of clicks, the user will find themselves at the links for the Contract Document Workflow.

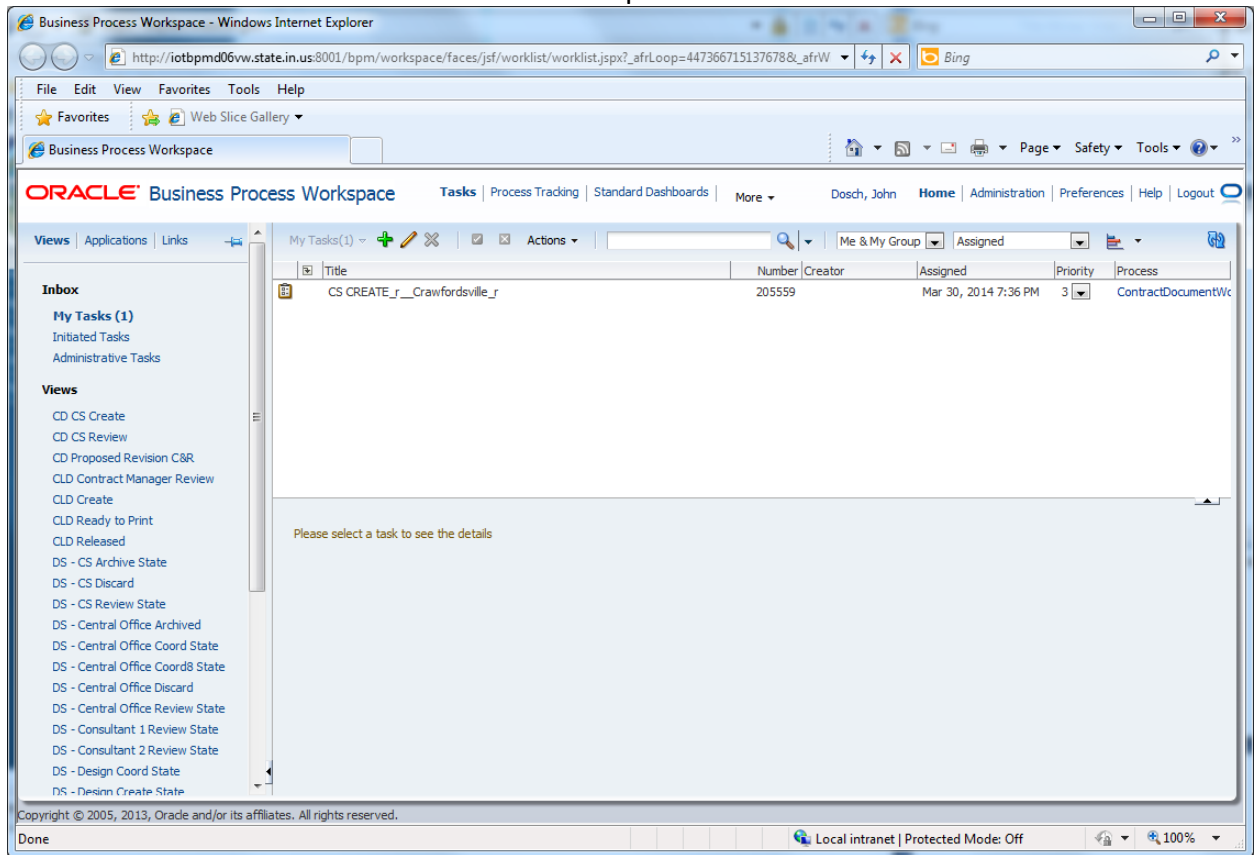
Application Details	
Name	Contract Document Workflow
UCM URL	Click here to access application
BPM URL	Click here to access application
File Upload URL	Click here to access application
Description	Contract Document Workflow
Abbreviation	CDW
Last Login Time	
No of Users Logged In Today	0

The three links are broken out as follows.

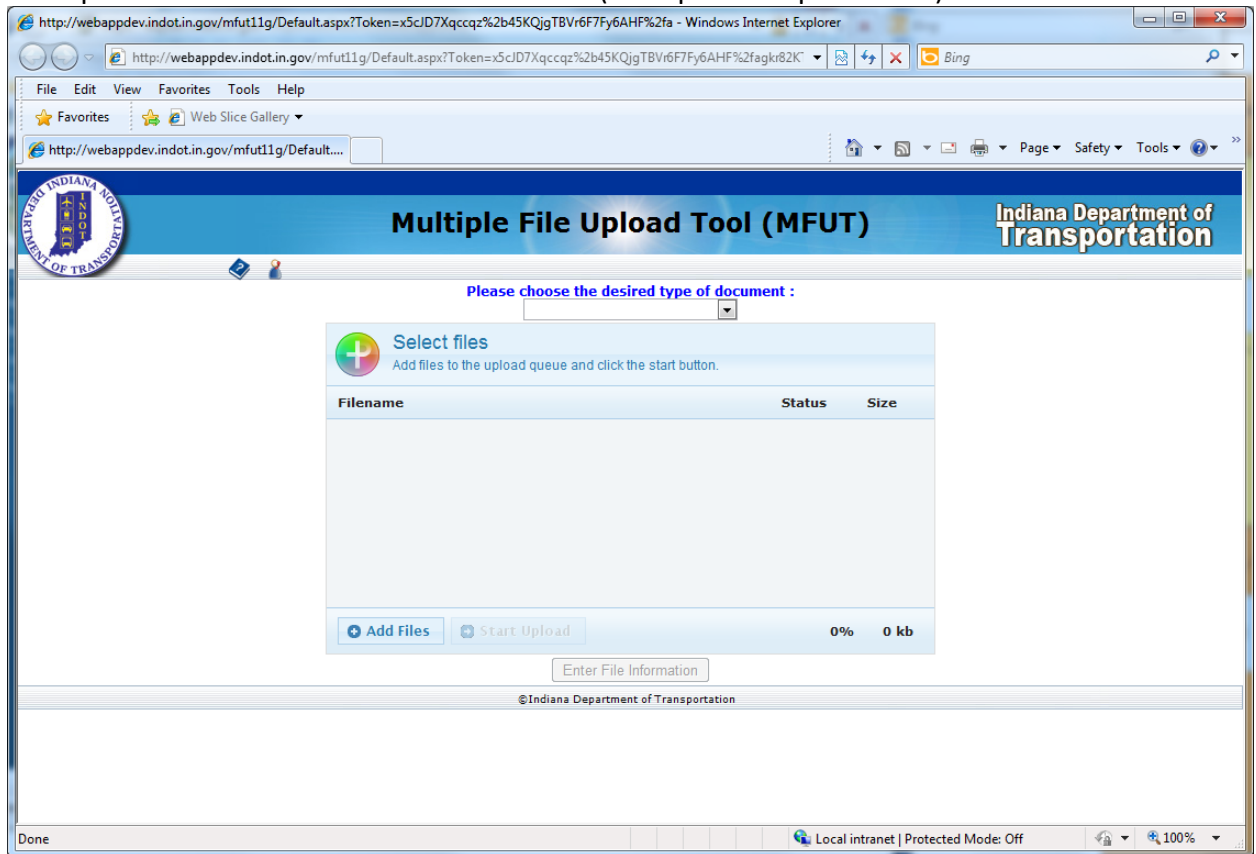
- UCM URL – Will take the user to the UCM website



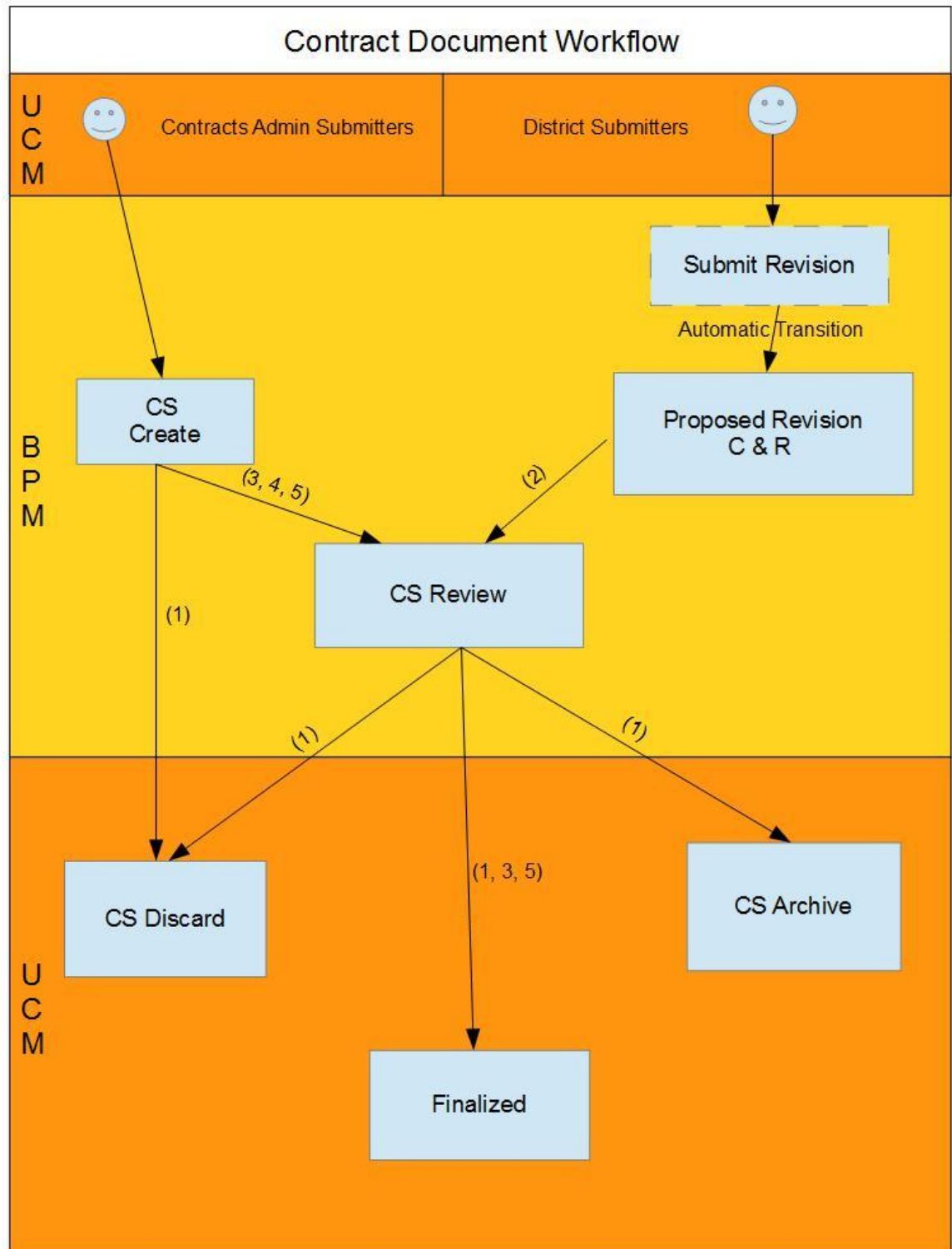
- BPM URL – Will take the user to the BPM workspace



- File Upload URL – Will take the user to MFUT (Multiple File Upload Tool)



2.) Workflow Layout

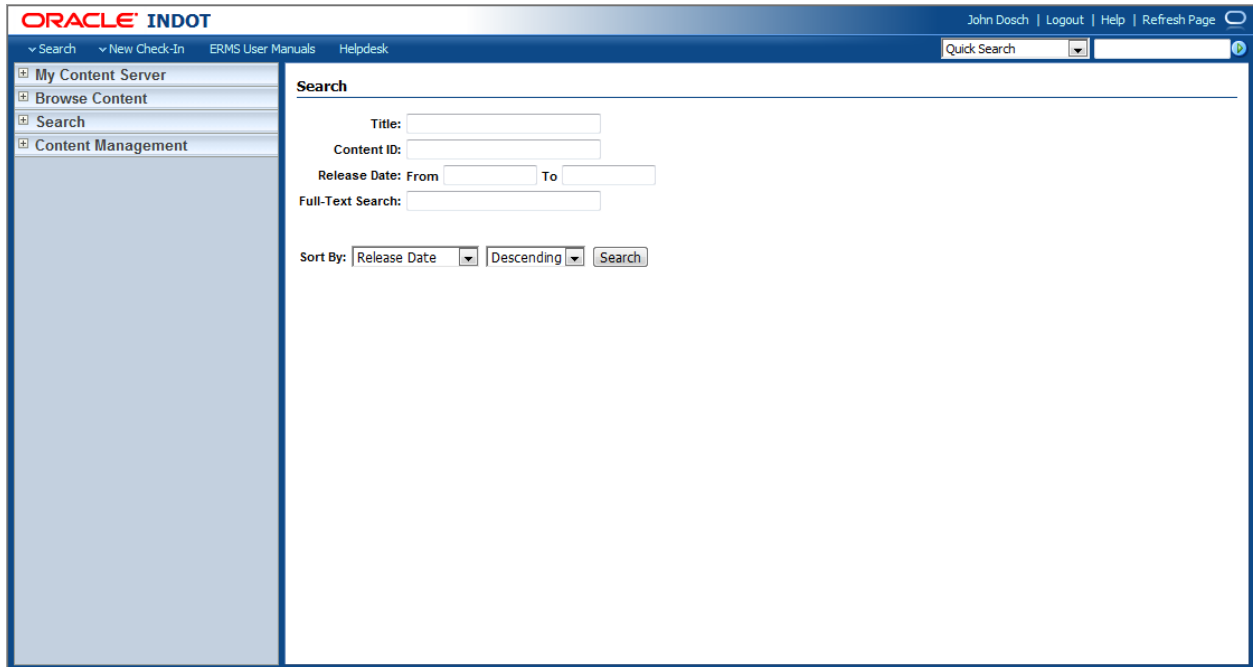


Presented in the above figure is a diagram of the Contract Document Workflow. A few key points about the diagram follow.

- Contracts Admin Submitters includes the roles of :
 - Estimator
 - Technical Writer
- District Submitters includes the roles of :
 - Design Crawfordsville
 - Design Fort Wayne
 - Design Greenfield
 - Design LaPorte
 - Design Seymour
 - Design Vincennes
 - Design Manager Crawfordsville
 - Design Manager Fort Wayne
 - Design Manager Greenfield
 - Design Manager LaPorte
 - Design Manager Seymour
 - Design Manager Vincennes
- The numbers on each of the transitions says who is capable of making the transition and corresponds to the following list :
 1. CS Review Specialist
 2. Assigned Const Area Eng
 3. Contract Manager
 4. Estimator
 5. Technical Writer

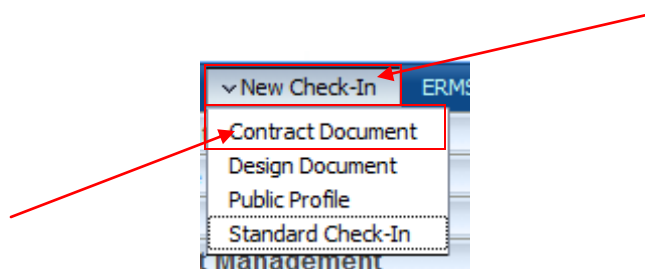
3.) Initial Submission Routes

There are two submission routes into the Contract Document Workflow. As shown by the diagram they are “Contracts Admin Submitters” and “District Submitters.” The roles that are involved with these groups are mentioned in the key points about the workflow diagram. When submitting files, users will go through the UCM interface.



The screenshot shows the ORACLE INDOT user interface. The top navigation bar includes links for Search, New Check-In, ERMS User Manuals, and Helpdesk. A user profile for John Dosch is visible with options for Logout, Help, and Refresh Page. The left sidebar contains a tree view with 'My Content Server', 'Browse Content', 'Search', and 'Content Management'. The main content area is titled 'Search' and contains several input fields: 'Title:', 'Content ID:', 'Release Date: From' and 'To', and 'Full-Text Search:'. Below these fields are 'Sort By:' dropdowns for 'Release Date' and 'Descending', followed by a 'Search' button.

To start the check in process, click on the “New Check-In” dropdown and choose the option for “Contract Document.”



This will bring up the form for checking in a new document.

Content Check-In Form for Contract Document

* Title

Author

jdosch

* Security Group

contract_document

* Profile

contract_document

* Status

No Selection

* Document Type

No Selection

* Contract Number

* LettingDate

* District

No Selection

DES Number

Location

Route Number

County

No Selection

RevisionDate

Structure Number

Comments

Keywords

RetentionPeriod

* Files

[Upload More Files...](#)

From here, fill out the required fields (marked in red) and select your file. Then click on the “Check In” button to submit the file. The difference in this form, depending on which submission route the user’s role is involved in, is the value available in the “Status” dropdown.

A.) Contracts Admin Submitters

Those users that have a role involved in this submission path will only be able to select “CS CREATE” for the “Status” value.

B.) District Submitters

Those users that have a role involved in this submission path will only be able to select “SUBMIT REVISION” for the “Status” value.

4.) Security By State

STATE	ROLE	READ	WRITE	DELETE
PROPOSED REVISION C&R	Associated Construction Area Engineer	Y	Y	
	Associated Design	Y	Y	
	Associated Design Manager	Y	Y	
	Associated Project Manager	Y		
STATE	ROLE	READ	WRITE	DELETE
CS CREATE	Contract Manager	Y	Y	
	Estimator	Y	Y	
	Technical Writer	Y	Y	
	CS Review Specialist	Y	Y	
STATE	ROLE	READ	WRITE	DELETE
CS REVIEW	Contract Manager	Y	Y	
	Estimator	Y	Y	
	Technical Writer	Y	Y	
	CS Review Specialist	Y	Y	
	Associated Construction Area Engineer	Y		
	Associated Design	Y		
	Associated Design Manager	Y		
	Associated Project Manager	Y		
	Federal Reviewer	Y		
STATE	ROLE	READ	WRITE	DELETE
CS DISCARD	Contract Manager			
	Estimator			
	Technical Writer			
	CS Review Specialist	Y		
	Associated Construction Area Engineer			
	Associated Design			
	Associated Design Manager			
	Associated Project Manager			
	Federal Reviewer			

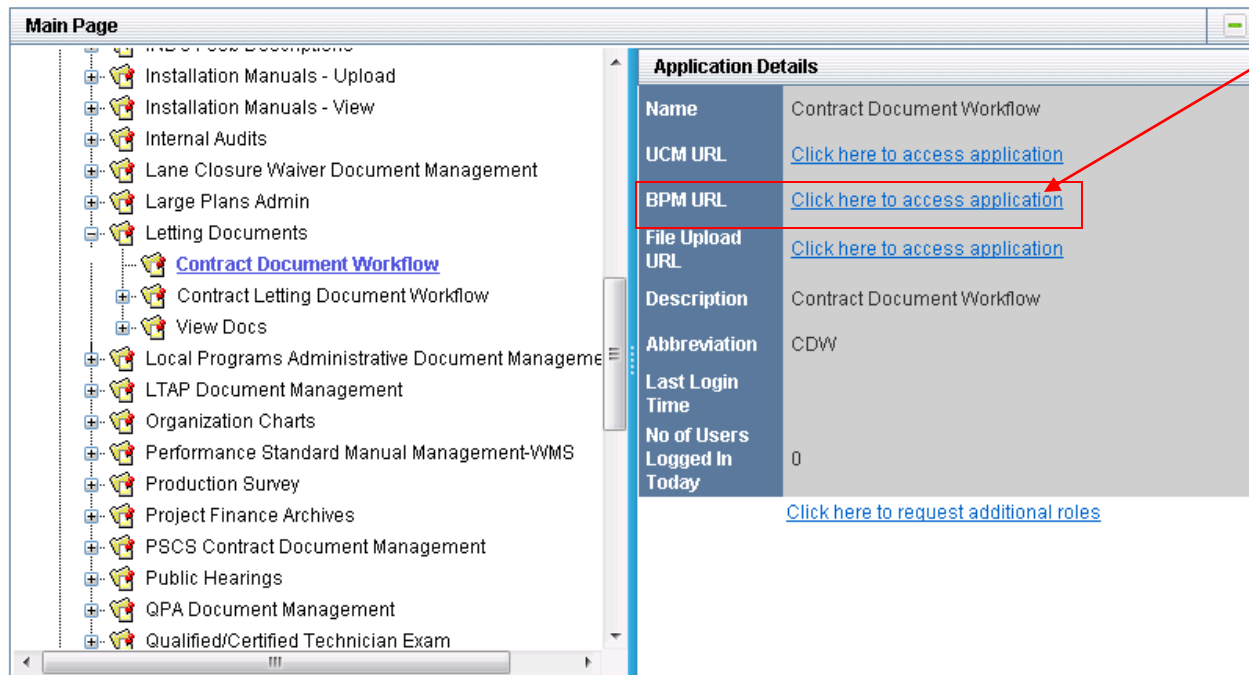
STATE	ROLE	READ	WRITE	DELETE
CS ARCHIVE	Contract Manager			
	Estimator			
	Technical Writer			
	CS Review Specialist	Y		
	Associated Construction Area Engineer			
	Associated Design			
	Associated Design Manager			
	Associated Project Manager			
	Federal Reviewer			
STATE	ROLE	READ	WRITE	DELETE
FINALIZED	Contract Manager	Y		
	Estimator	Y		
	Technical Writer	Y		
	CS Review Specialist	Y		
	Associated Construction Area Engineer	Y		
	Associated Design	Y		
	Associated Design Manager	Y		
	Associated Project Manager	Y		
	Federal Reviewer	Y		

5.) Transition Descriptions

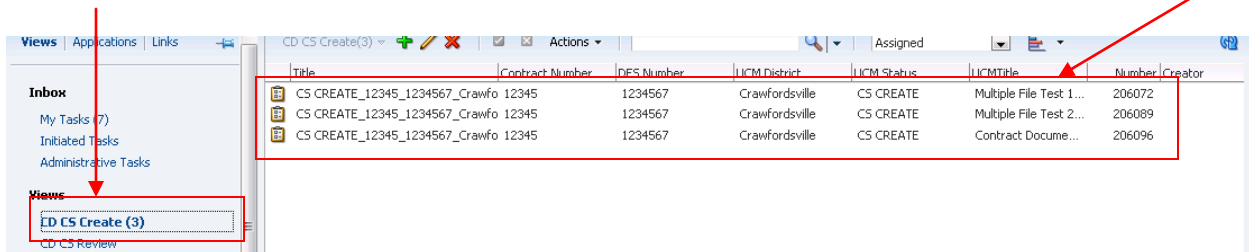
Following are descriptions of the transitions that are available in the Contract Document Workflow.

5.a) CS Create → CS Review:

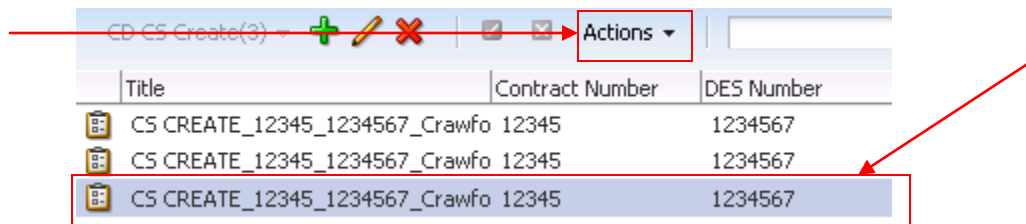
The roles that can enact this transition are Contract Manager, Estimator, and Technical Writer. In order to start this transition, the user needs to click on the “BPM URL” link in ITAP.



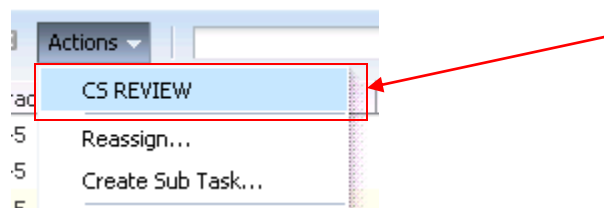
Once the user is in BPM, they should select the view titled “CD CS Create.” This will provide them with a list of all the files in the “CS CREATE” status.



Select the file(s) that need to be transitioned, and then click on the “Actions” dropdown to select the destination for the files.



The top of the “Actions” dropdown will show the possible destinations for the file. For the Contract Document Workflow, the only option is “CS REVIEW.” Click on this to send the document(s) to “CS REVIEW.”



5.b) Proposed Revision C&R → CS Review:

The roles that can enact this transition are any of the Construction Area Engineer roles. And they can only enact the transition for documents that belong to their district. In order to start this transaction, the user needs to click on the “BPM URL” link in ITAP.

The screenshot shows the ITAP Main Page. On the left is a tree view of applications, with 'Contract Document Workflow' selected. On the right is the 'Application Details' panel. The 'BPM URL' field is highlighted with a red box, and a red arrow points to the link 'Click here to access application'.

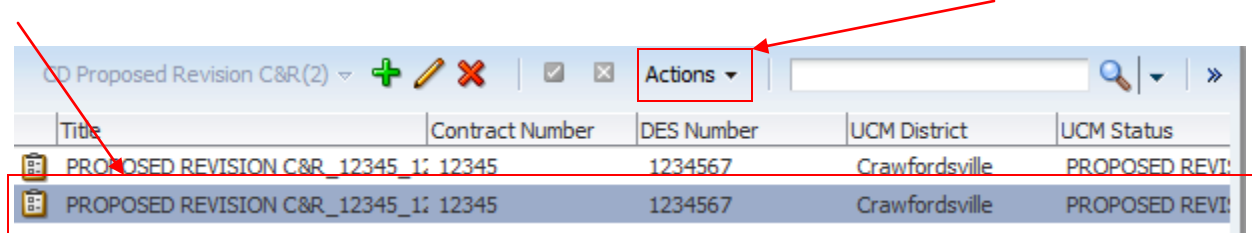
Application Details	
Name	Contract Document Workflow
UCM URL	Click here to access application
BPM URL	Click here to access application
File Upload URL	Click here to access application
Description	Contract Document Workflow
Abbreviation	CDW
Last Login Time	
No of Users Logged In Today	0
Click here to request additional roles	

Once the user is in BPM, they should select the view titled “CD PROPOSED REVISION C&R.” This will provide them with a list of all the files in the “PROPOSED REVISION C&R” status.

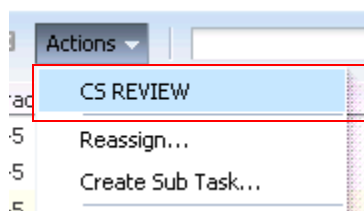
The screenshot shows the ITAP interface. On the left, the 'Views' menu has 'CD Proposed Revision C&R (2)' selected, highlighted with a red box. On the right, a table displays the list of proposed revision C&R items.

Title	Contract Number	DES Number	UCM District	UCM Status
PROPOSED REVISION C&R_12345_1: 12345	12345	1234567	Crawfordsville	PROPOSED REVI:
PROPOSED REVISION C&R_12345_1: 12345	12345	1234567	Crawfordsville	PROPOSED REVI:

Select the file(s) that need to be transitioned, and then click on the “Actions” dropdown to select the destination for the files.

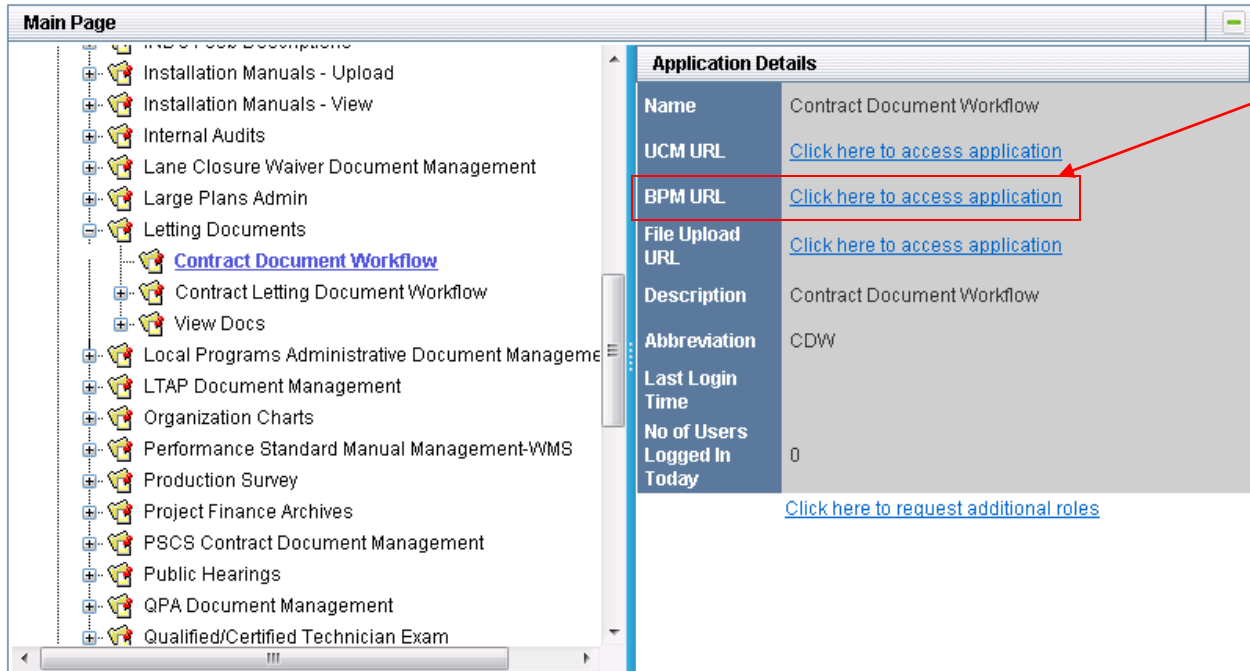


The top of the “Actions” dropdown will show the possible destinations for the file. For the Contract Document Workflow, the only option is “CS REVIEW.” Click on this to send the document(s) to “CS REVIEW.”

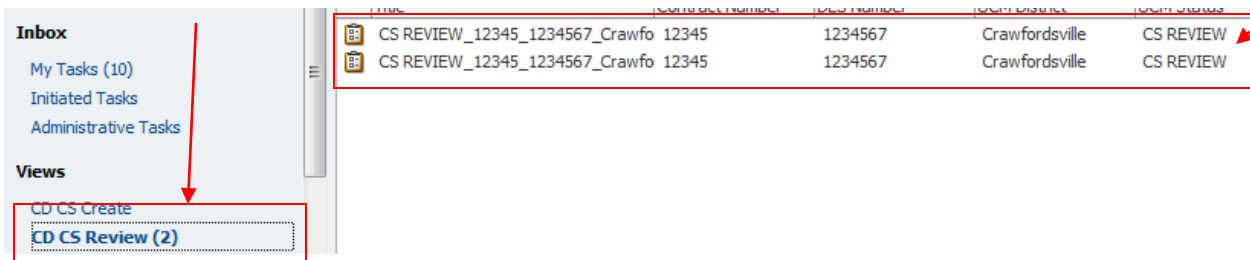


5.c) CS Review → Finalized

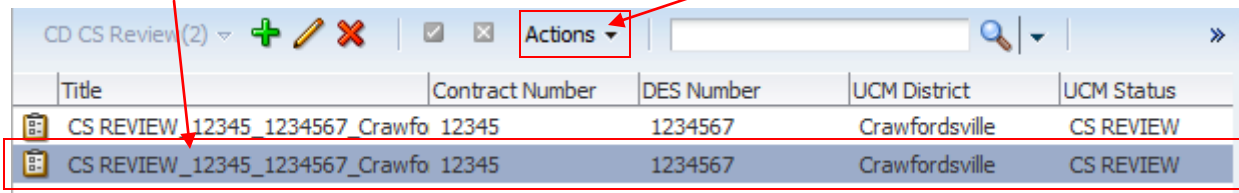
The roles that can enact this transition are CS Review Specialist, Contract Manager, and Technical Writer. In order to start this transaction, the user needs to click on the “BPM URL” link in ITAP.



Once the user is in BPM, they should select the view titled “CD CS REVIEW.” This will provide them with a list of all the files in the “CS REVIEW” status.



Select the file(s) that need to be transitioned, and then click on the “Actions” dropdown to select the destination for the files.



CD CS Review (2)					
+ - ✕ ✓ ✕ Actions					
Title	Contract Number	DES Number	UCM District	UCM Status	
CS REVIEW_12345_1234567_Crawfo	12345	1234567	Crawfordsville	CS REVIEW	
CS REVIEW_12345_1234567_Crawfo	12345	1234567	Crawfordsville	CS REVIEW	

The top of the “Actions” dropdown will show the possible destinations for the file. For the Contract Document Workflow, the only option is “FINALIZED.” Click on this to send the document(s) to “FINALIZED.”

5.d) CS Create → CS Discard

The role that can enact this transition is the CS Review Specialist. In order to start this transaction, the user needs to click on the “BPM URL” link in ITAP.

The screenshot shows the ITAP Main Page. On the left is a tree view of applications, with 'Contract Document Workflow' selected. On the right is the 'Application Details' panel. The 'BPM URL' field is highlighted with a red box, and a red arrow points to the link 'Click here to access application'.

Application Details	
Name	Contract Document Workflow
UCM URL	Click here to access application
BPM URL	Click here to access application
File Upload URL	Click here to access application
Description	Contract Document Workflow
Abbreviation	CDW
Last Login Time	
No of Users Logged In Today	0

[Click here to request additional roles](#)

Once the user is in BPM, they should select the view titled “CD CS Create.” This will provide them with a list of all the files in the “CS CREATE” status.

The screenshot shows the ITAP interface with the 'CD CS Create (3)' view selected. The view displays a list of files in the 'CS CREATE' status. The 'CD CS Create (3)' view is highlighted with a red box, and a red arrow points to it.

Title	Contract Number	DES Number	UCM District	UCM Status	UCM Title	Number	Creator
CS CREATE_12345_1234567_Crawfo	12345	1234567	Crawfordsville	CS CREATE	Multiple File Test 1...	206072	
CS CREATE_12345_1234567_Crawfo	12345	1234567	Crawfordsville	CS CREATE	Multiple File Test 2...	206089	
CS CREATE_12345_1234567_Crawfo	12345	1234567	Crawfordsville	CS CREATE	Contract Docume...	206096	

Select the file that needs to be transitioned and wait for the Content Information page to open in the panel below.

The screenshot shows a web application interface. At the top, there is a table with columns for document details. A red arrow points to the first row of the table, which contains the following information:

Document Name	Content ID	Location	Document Type	Status	Revision	Letting Date	Letting District	Letting DES Number	Letting Location	Letting Route Number	Letting County	Letting Revision Date	Letting Structure Number	Letting Comments	Letting Keywords	Letting Account	Letting Profile Trigger	Letting Checked Out By	Letting Status	Letting Formats
CS CREATE_1234__Crawfordsville_test	1234	Crawfordsville	CS CREATE	test	206385	Apr 17, 2014 4:28 PM	3	ContractDocumentW												

Below the table, the 'Content Information' page for the selected document is displayed. A red arrow points to the 'Content Information' section. The page shows the following details:

- Title: test
- Content ID: INDOTDEV_1545261
- Author: [TKoers](#)
- Revision: 1
- Security Group: contract_document
- Profile: contract_document
- Status: CS CREATE
- Document Type: Schedule of Pay Items
- Contract Number: 1234
- Letting Date: 4/26/14 12:00 AM
- District: Crawfordsville
- DES Number:
- Location:
- Route Number:
- County:
- Revision Date:
- Structure Number:
- Comments:
- Keywords:
- Account: CD/CSCR/Crawfordsville/INDOT
- Profile Trigger: CD-CSC
- Checked Out By:
- Status: Released
- Formats: application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

At the bottom of the page, there is a 'Links' section.

From the document's Content Information page, click on the "Content Actions" dropdown and select the "Update" option.

The screenshot shows the 'Content Actions' dropdown menu. A red arrow points to the 'Content Actions' dropdown button, and another red arrow points to the 'Update' option in the menu. The menu options are:

- Check Out
- Update
- Check In Similar
- Subscribe
- Check Out and Open
- Add Attachments
- Add to Folder
- Add to Folder as Short Cut

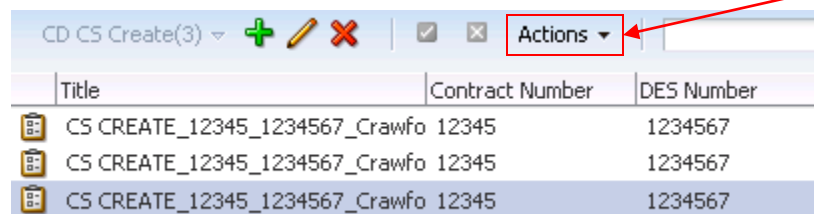
This will bring the user to the Update screen. From here, the user should change the “Status” value of the document to “CS DISCARD.”

* Profile | contract_document ▾
* Status | CS DISCARD ▾
Document Type | Schedule of Pay Items ▾

Then click on the “Submit Update” button. This button is at the bottom of the screen.

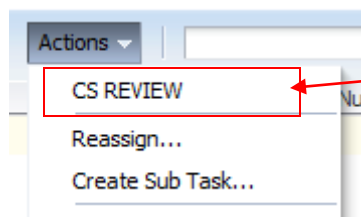
Submit Update

Now, with the file still selected, click on the “Actions” dropdown.



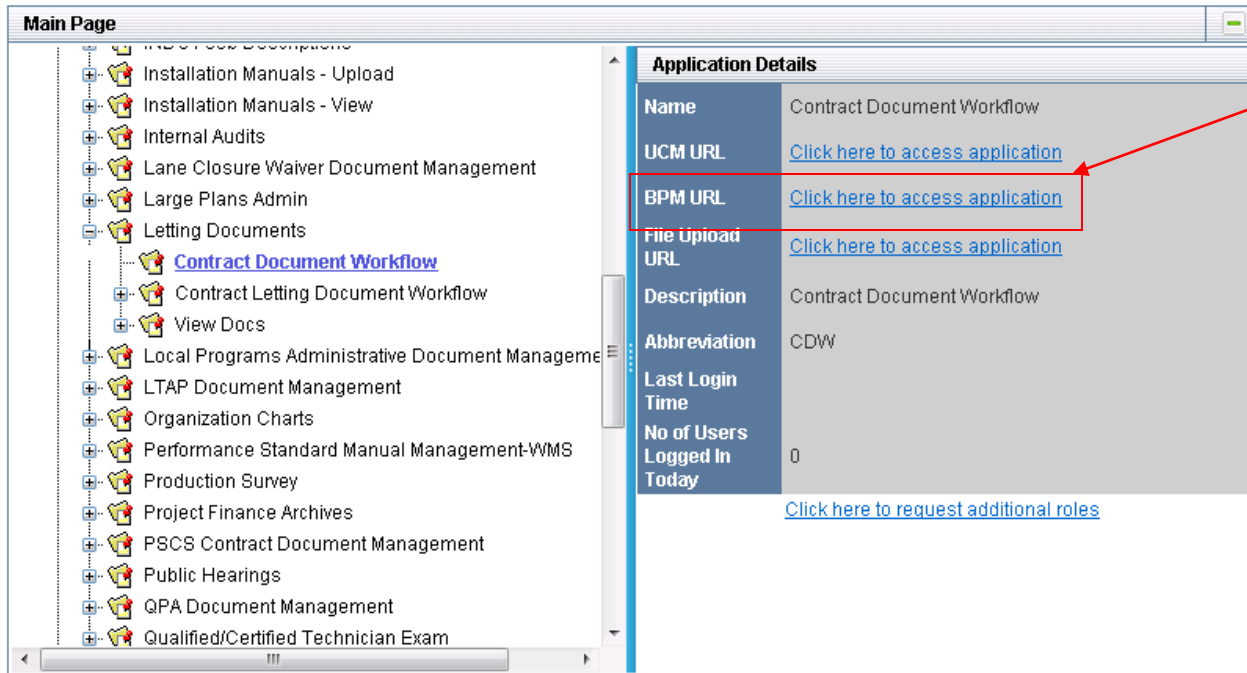
	Title	Contract Number	DES Number
	CS CREATE_12345_1234567_Crawfo	12345	1234567
	CS CREATE_12345_1234567_Crawfo	12345	1234567
	CS CREATE_12345_1234567_Crawfo	12345	1234567

The only option available in the “Actions” dropdown is “CS REVIEW.” This is still the option to select. The status being set to “CS DISCARD” will cause the workflow to bypass the path to “CS REVIEW” and send the document to “CS DISCARD” instead.

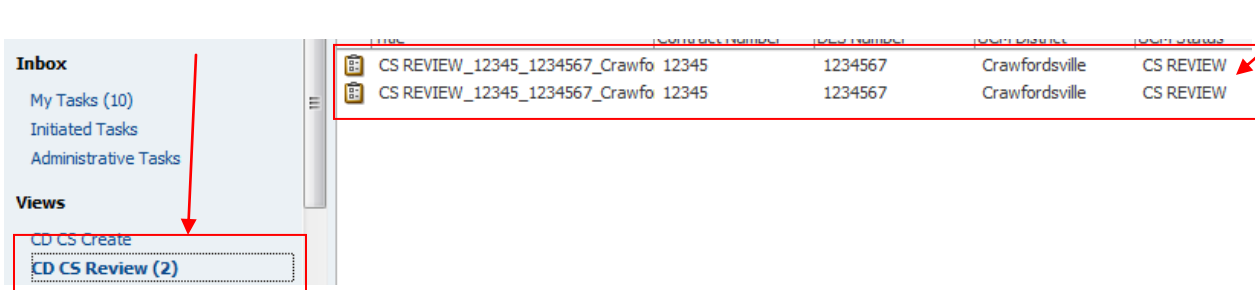


5.e) CS Review → CS Discard

The role that can enact this transition is the CS Review Specialist. In order to start this transaction, the user needs to click on the “BPM URL” link in ITAP.



Once the user is in BPM, they should select the view titled “CD CS REVIEW.” This will provide them with a list of all the files in the “CS REVIEW” status.



Select the file that needs to be transitioned and wait for the Content Information page to open in the panel below.

The screenshot shows a web application interface. At the top, a breadcrumb trail reads: CS REVIEW_12345_1234567_Crawfo 12345 > 1234567 > Crawfordsville > CS REVIEW > Proposed Revision... > 206402 > Apr 21, 2014 2:00 PM. Below this, the main heading is 'CS REVIEW_12345_1234567_Crawfordsville_Proposed Revision C&R test 400'. Underneath the heading is a 'Contents' link. The 'Content Information' section displays the following details:

- Title: Proposed Revision C&R test 400
- Content ID: INDOTDEV_1545266
- Author: [idosch](#)
- Revision: 1
- Security Group: contract_document
- Profile: contract_document
- Status: CS REVIEW
- Document Type: Proposed Revision
- Contract Number: 12345
- LettingDate: 4/15/14 12:00 AM
- District: Crawfordsville
- DES Number: 1234567
- Location:
- Route Number:
- County:
- RevisionDate:
- Structure Number:
- Comments:
- Keywords:
- Account: CD/CSREV/Crawfordsville/INDOT
- ProfileTrigger: CD-CSR
- Checked Out By:

From the document's Content Information page, click on the "Content Actions" dropdown and select the "Update" option.

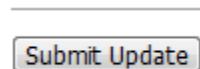
The screenshot shows a dropdown menu titled 'Content Actions'. The menu is open, displaying several options. The 'Update' option is highlighted with a red box. A red arrow points to the 'Update' option from the right. Another red arrow points to the 'Content Actions' dropdown button from the top right. The options in the menu are:

- Check Out
- Update
- Check In Similar
- Subscribe
- Check Out and Open
- Add Attachments
- Add to Folder
- Add to Folder as Short Cut

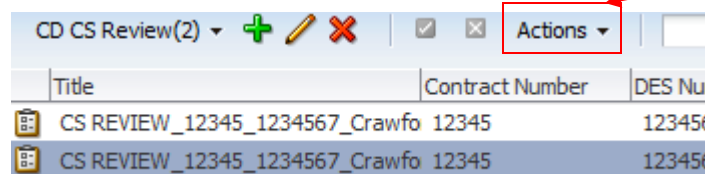
This will bring the user to the Update screen. From here, the user should change the “Status” value of the document to “CS DISCARD.”

* Profile | contract_document ▾
* Status | CS DISCARD ▾
Document Type | Schedule of Pay Items ▾

Then click on the “Submit Update” button. This button is at the bottom of the screen.



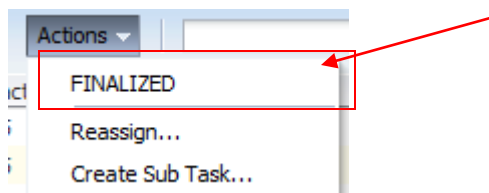
Now, with the file still selected, click on the “Actions” dropdown.



The screenshot shows a table with three columns: Title, Contract Number, and DES Number. There are two rows of data. Above the table is a toolbar with icons for adding, editing, and deleting, as well as checkboxes and an "Actions" dropdown menu. A red box highlights the "Actions" dropdown, and a red arrow points to it from the right.

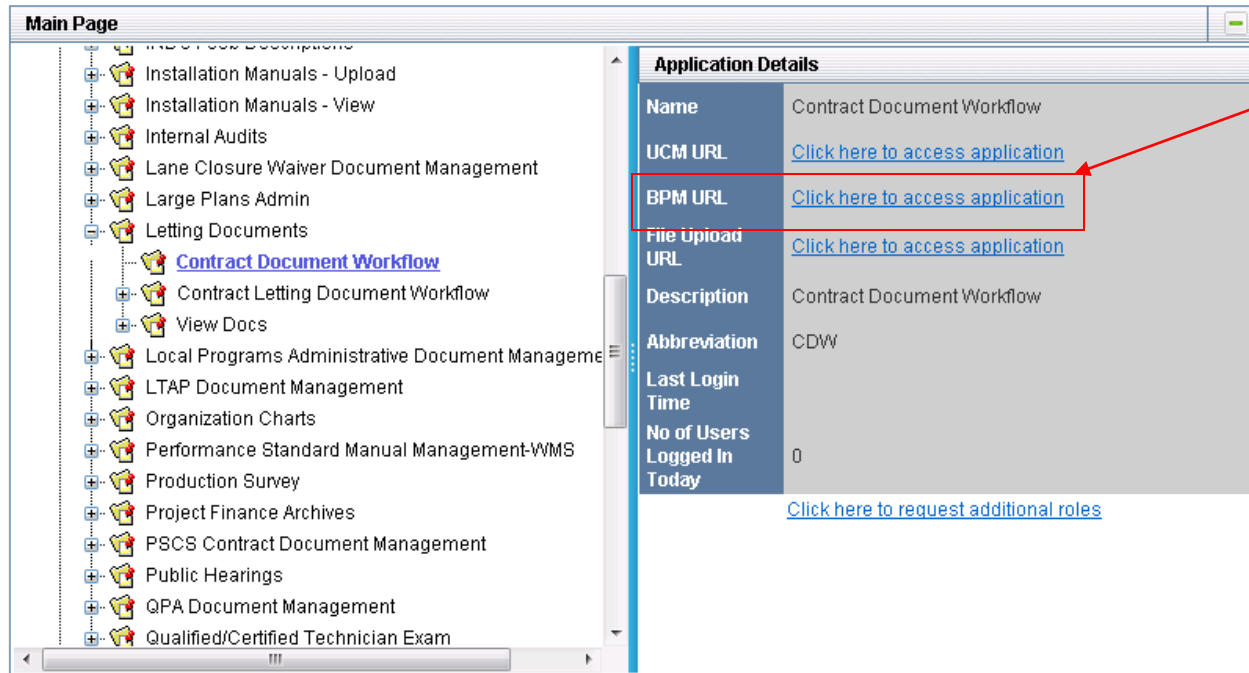
Title	Contract Number	DES Number
CS REVIEW_12345_1234567_Crawfo	12345	123456
CS REVIEW_12345_1234567_Crawfo	12345	123456

The only option available in the “Actions” dropdown is “FINALIZED.” This is still the option to select. The status being set to “CS DISCARD” will cause the workflow to bypass the path to “FINALIZED” and send the document to “CS DISCARD” instead.

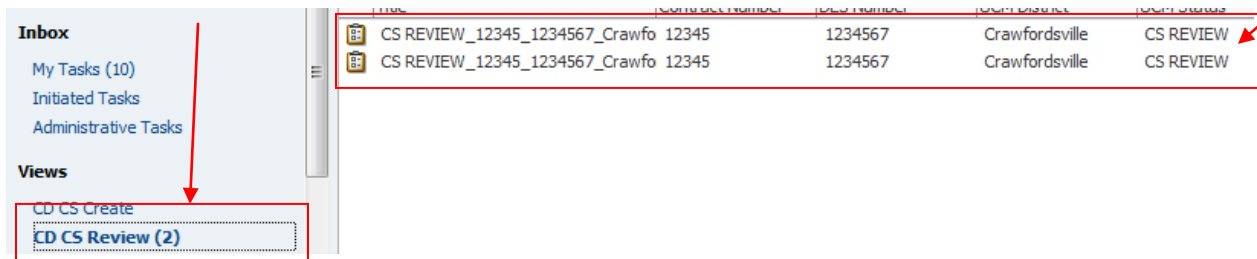


5.f) CS Review → CS Archive

The role that can enact this transition is the CS Review Specialist. In order to start this transaction, the user needs to click on the “BPM URL” link in ITAP.



Once the user is in BPM, they should select the view titled “CD CS REVIEW.” This will provide them with a list of all the files in the “CS REVIEW” status.



Select the file that needs to be transitioned and wait for the Content Information page to open in the panel below.

The screenshot shows a web application interface. At the top, a blue header bar contains the text: CS REVIEW_12345_1234567_Crawfo 12345, 1234567, Crawfordsville, CS REVIEW, Proposed Revision..., 206402, and Apr 21, 2014 2:00 PM. Below the header, a breadcrumb trail reads: CS REVIEW_12345_1234567_Crawfordsville_Proposed Revision C&R test 400. The main content area is titled 'Content Information' and displays the following details:

- Title: Proposed Revision C&R test 400
- Content ID: INDOTDEV_1545266
- Author: [idosch](#)
- Revision: 1
- Security Group: contract_document
- Profile: contract_document
- Status: CS REVIEW
- Document Type: Proposed Revision
- Contract Number: 12345
- LettingDate: 4/15/14 12:00 AM
- District: Crawfordsville
- DES Number: 1234567
- Location:
- Route Number:
- County:
- RevisionDate:
- Structure Number:
- Comments:
- Keywords:
- Account: CD/CSREV/Crawfordsville/INDOT
- ProfileTrigger: CD-CSR
- Checked Out By:

From the document's Content Information page, click on the "Content Actions" dropdown and select the "Update" option.

The screenshot shows a dropdown menu titled 'Content Actions'. The menu is open, displaying the following options: Check Out, Update, Check In Similar, Subscribe, Check Out and Open, Add Attachments, Add to Folder, and Add to Folder as Short Cut. The 'Update' option is highlighted with a red box. A red arrow points to the 'Content Actions' dropdown button, and another red arrow points to the 'Update' option.

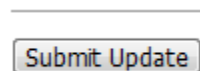
This will bring the user to the Update screen. From here, the user should change the “Status” value of the document to “CS ARCHIVE.”

* Profile

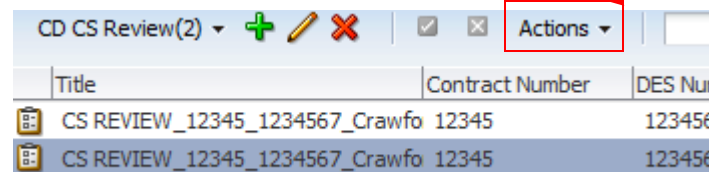
* Status

ent Type

Then click on the “Submit Update” button. This button is at the bottom of the screen.



Now, with the file still selected, click on the “Actions” dropdown.



The screenshot shows a table with three columns: Title, Contract Number, and DES Nur. There are two rows of data. Above the table is a toolbar with icons for adding, editing, and deleting, and a checkbox. To the right of the table is an "Actions" dropdown menu, which is highlighted with a red box and a red arrow pointing to it.

Title	Contract Number	DES Nur
CS REVIEW_12345_1234567_Crawfo	12345	123456
CS REVIEW_12345_1234567_Crawfo	12345	123456

The only option available in the “Actions” dropdown is “FINALIZED.” This is still the option to select. The status being set to “CS DISCARD” will cause the workflow to bypass the path to “FINALIZED” and send the document to “CS DISCARD” instead.

